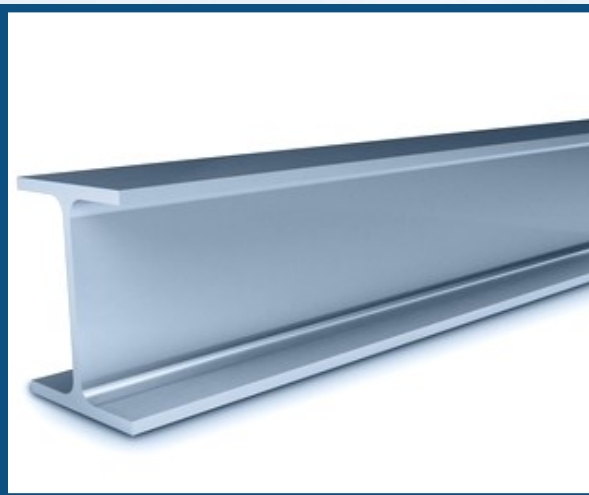


Primary Metals Manufacturing

The primary metals manufacturing industry (NAICS 331) comprises establishments involved in transforming iron ore into basic metal products using metallurgical techniques. Establishments in this industry include iron & steel mills, smelters, and foundries. End products include metal pipes, tubes, sheets, wires, billets, and castings made of iron, steel, copper, aluminum, other metals, and alloys of various metals.



Texas Industry Totals

Firms	379
Employment	23,163
Average Annual Wage	\$58,344
Total Capital Investments	\$349 million
Value Added Per Employee	\$263,498
Value of Shipments	\$17.9 billion

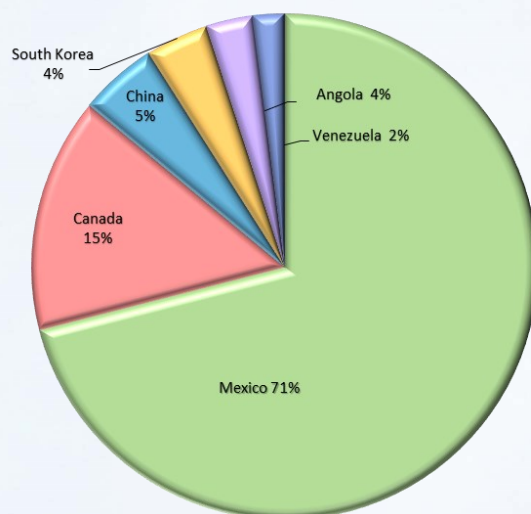
How Texas Ranks in the U.S.

All Employees	No. 6
Production Workers	No. 6
Value Added	No. 5
Value of Shipments	No. 4
Total Capital Investments	No. 7

Texas Exports

- Texas primary metals exports in 2014 were valued at \$7.5 billion.
- In 2014, primary metals was Texas' 9th largest export sector.
- Top metal commodities shipped from Texas ports include aluminum and flat-rolled iron & steel.

Top Export Markets



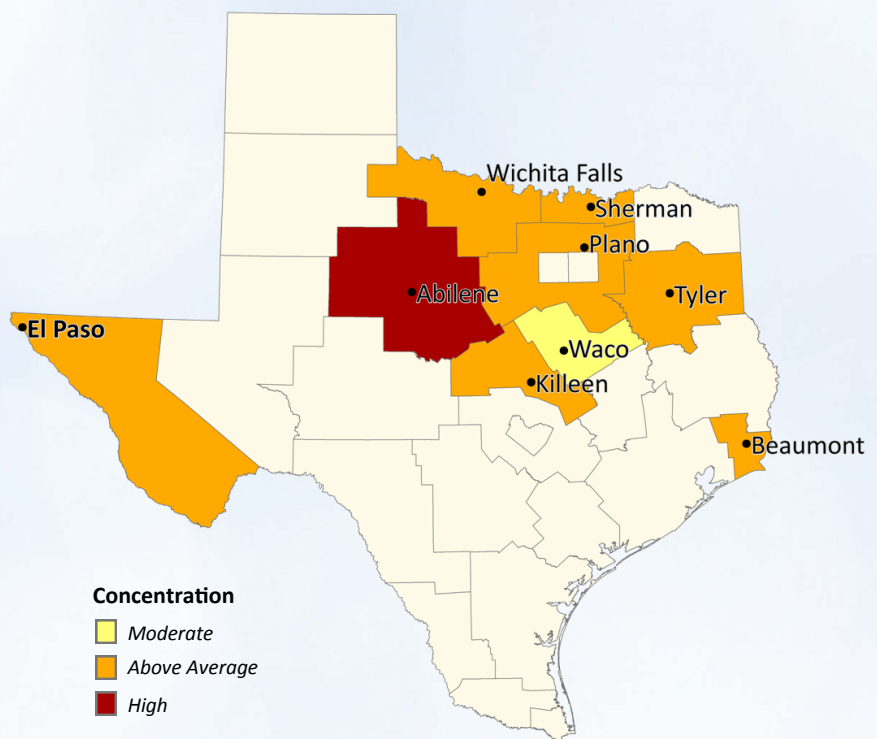
Sources: Texas Workforce Commission, U.S. Census Annual Survey of Manufactures, WISERTrade, Texas Manufacturers Register

Major Industry Employers in Texas

Company	Location(s)	Products
Alcoa	Point Comfort, etc.	Alumina processing, aluminum smelting
Nucor Corp.	Jewett, Grapeland	Steel bars, beams, & other building components
Commercial Metals Co. (CMC)	Dallas, etc.	Reinforced steel, rebar, billets, metal recycling
Western Extrusions	Carrollton	Aluminum extrusion products
JSW Steel USA	Baytown	Steel pipe and plate

Regional Concentrations

The map at right identifies the state's Workforce Development regions with above-average specializations in primary metals manufacturing. The highlighted regions are not the only areas in Texas where workers in this sector can be found, but rather represent areas with the greatest concentrations relative to the size of the local labor force. This industry is primarily concentrated across North Texas.



Recent Industry Trends

- Texas primary metals industry wages increased by 4.9% between Q3 2013 and Q3 2014.
- Construction is ongoing at Italy-based Tenaris' \$1.5 billion steel pipe manufacturing facility in Bay City, Texas. The plant is expected to be complete in 2016 and to create 600 new jobs.
- Construction is ongoing at Austria-based voestalpine's \$700+ million iron ore processing plant in Corpus Christi, Texas. The plant is expected to be complete in 2016 and to create 150 new jobs.
- In July 2014, Houston-based Alamo Tube announced plans to build a \$62.5 million oilfield-related pipe mill and finishing facility in Elmendorf, just south of San Antonio. It will employ over 200 when done.